



Procurement Review Comprehensive Checklist
Procurement Services Division
This form must accompany all Purchase Order Requisitions

SECTION 1: DESCRIPTION

General Tracking		Contract Terms	
FILE ID#: 24-0451	RFP, BID, QUOTE OR RENEWAL #: Quote #42127053	INITIAL TERM WITH RENEWALS: OTHER	INITIAL TERM TOTAL COST: \$42,437.99
COMMITTEE: TECHNOLOGY	TARGET COMMITTEE DATE: 02/06/2024	PROMPT FOR RENEWAL: 3 MONTHS	CONTRACT TOTAL COST WITH ALL RENEWALS: \$42,437.99
	CURRENT TERM TOTAL COST: \$42,437.99	MAX LENGTH WITH ALL RENEWALS: ONE YEAR	CURRENT TERM PERIOD: INITIAL TERM
Vendor Information		Department Information	
VENDOR: Carahsoft Technology Corp.	VENDOR #: 12189	DEPT: County Auditor	DEPT CONTACT NAME: Bill White
VENDOR CONTACT: Zachary Kutyn	VENDOR CONTACT PHONE: (703) 921-4059	DEPT CONTACT PHONE #: 630-407-6095	DEPT CONTACT EMAIL: Bill.White@dupagecounty.gov
VENDOR CONTACT EMAIL: Zachary.Kutyn@carahsoft.com	VENDOR WEBSITE: www.carahsoft.com	DEPT REQ #:	
Overview			
DESCRIPTION Identify scope of work, item(s) being purchased, total cost and type of procurement (i.e., lowest bid, RFP, renewal, sole source, etc.). Purchase of Workiva Audit Management Software through Carahsoft Technology Corp. on NASPO Master Contract # AR2472, Contract Term 8/7/17 - 9/16/26. Government Audit Management Solution, Implementation, and 12-months' Support Services.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished To automate internal audit processes, reporting, and workpapers. Currently the County Auditor's Office uses word documents and spreadsheets which is labor and time intensive.			

SECTION 2: DECISION MEMO REQUIREMENTS

DECISION MEMO NOT REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is not required.
DECISION MEMO REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is required.
COOPERATIVE (DPC2-352), GOVERNMENT JOINT PURCHASING ACT (30ILCS525) OR GSA SCHEDULE PRICING	

SECTION 3: DECISION MEMO

STRATEGIC IMPACT	Select an item from the following dropdown menu of County's strategic priorities that this action will most impact. CUSTOMER SERVICE
SOURCE SELECTION	Describe method used to select source. Cooperative Purchasing Agreement NASPO Master Contract # AR2472
RECOMMENDATION AND TWO ALTERNATIVES	Describe staff recommendation and provide justification. Identify at least 2 other options to accomplish this request, including status quo, (i.e., take no action). It is recommended to purchase Workiva Government Audit Management Software through Carahsoft. As an alternative, the County Auditor would need to hire additional staff due to the labor and time intensive nature of performing audits manually. If no action is taken and no additional staff hired, statutorily required internal audits will not be performed in a timely manner.

SECTION 4: SOLE SOURCE MEMO/JUSTIFICATION	
JUSTIFICATION Select an item from the following dropdown menu to justify why this is a sole source procurement.	
NECESSITY AND UNIQUE FEATURES	Describe the product or services that are not available from other vendors. Explain necessary and unique features or services. Attach letters from manufacturer, letters from distributor, warranties, licenses, or patents as needed. Be specific.
MARKET TESTING	List and describe the last time the market has been tested on the applicability of the sole source. If it has not been tested over the last 12 months, explain why not.
AVAILABILITY	Describe steps taken to verify that these features are not available elsewhere. Included a detailed list of all products or services by brand/manufacturer examined and include names, phone numbers, and emails of people contacted.

SECTION 5: Purchase Requisition Information			
<i>Send Purchase Order To:</i>		<i>Send Invoices To:</i>	
Vendor: Carahsoft Technology Corp	Vendor#: 12819	Dept: County Auditor's Office	Division:
Attn: Zachary Kutyn	Email: Zachary.Kutyn@carahsoft.com	Attn: Evelyn Peters	Email: Evelyn.Peters@dupagecounty.gov
Address: 11493 Sunset Hills Road, Suite 100	City: Reston	Address: 421 N. County Farm Rd, 3-400	City: Wheaton
State: Virginia	Zip: 20190	State: Illinois	Zip: 60187
Phone: (703) 921-4059	Fax: (703) 871-8505	Phone: (630) 407-6075	Fax:
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: SAME AS ABOVE	Vendor#:	Dept: County Auditor's Office	Division:
Attn:	Email:	Attn: Evelyn Peters	Email: Evelyn.Peters@dupagecounty.gov
Address:	City:	Address: 421 N. County Farm Rd, 3-400	City: Wheaton
State:	Zip:	State: Illinois	Zip: 60187
Phone:	Fax:	Phone: (630) 407-6075	Fax:
Shipping		Contract Dates	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): Mar 1, 2024	Contract End Date (PO25): Feb 28, 2025
Contract Administrator (PO25): County Auditor			

Purchase Requisition Line Details											
LN	Qty	UOM	Item Detail (Product #)	Description	FY	Company	AU	Acct Code	Sub-Accts/ Activity Code	Unit Price	Extension
1	1	EA	Workiva- GAM-491	Government Audit Management Solution - 6 Users	FY24	1000	4000	53807		26,385.22	26,385.22
2	1	EA	AR2472- CAAR001-100 4-002	Implementation, On- Boarding, 12-months' Support Services - 6 Users	FY24	1000	4000	53020		16,052.77	16,052.77
<i>FY is required, assure the correct FY is selected.</i>										Requisition Total	\$ 42,437.99

Comments	
HEADER COMMENTS	Provide comments for P020 and P025.
SPECIAL INSTRUCTIONS	Provide comments for Buyer or Approver (not for P020 and P025). Comments will not appear on PO. Please send PO to Evelyn Peters and Bill White.
INTERNAL NOTES	Provide comments for department internal use (not for P020 and P025). Comments will not appear on PO.
APPROVALS	Department Head signature approval for procurements under \$15,000. Procurement Officer Approval for ETSB.

The following documents have been attached: ☐ W-9 ☒ Vendor Ethics Disclosure Statement